Tipasa Release Notes, March 2020

Release Date: March 8, 2020

Introduction

This release of Tipasa provides new features, enhancements, and bug fixes that will help you manage more complex workflows, including:

- Use Automated Request Manager to set up and manage automations
- Deliver Get It Now articles via Article Exchange

These enhancements are the direct result of your feedback.

Recommended actions

For this release, we recommend that you review the following checklists and complete the relevant tasks so that you can adjust your policies and workflows and train your staff. These checklists identify updates that we have determined as significant for most institutions. We encourage you to review all of the items in the release notes to determine whether there are other items that might require additional action or follow up by your institution.

Administrative actions

These items require immediate action or decisions.

<table>
<thead>
<tr>
<th>ACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>It's very important to clear your browser's cache before starting to work with Tipasa!</strong></td>
</tr>
</tbody>
</table>

If this link to your library’s catalog has not been set up:

[Search my library’s online catalog](https://help.oclc.org/Resource_Sharing/Tipasa/Release_notes_and_known_issues/2020_release_notes/100Tipasa...)

Or if the link needs to be updated, follow the instructions below. When you have enabled your online catalog links, you can quickly search your catalog for requested items as a borrower or lender.
If your library uses WorldShare Management Services (WMS), we encourage you to enable integrations with WorldShare Circulation and WorldShare Acquisitions.

https://help.oclc.org/Resource_Sharing/Tipasa/WorldShare_Circulation_Integration
https://help.oclc.org/Resource_Sharing/Tipasa/WorldShare_Acquisitions_integration

Note: OPAC integration has been turned on for all WMS libraries.

If your library uses Ex Libris Alma, we encourage you to enable OPAC integration for automatic retrieval of local holdings and availability information and circulation integration for automatic creation of temporary items and automated checkout/check-in. Please contact OCLC Support to request these be enabled.

https://help.oclc.org/Resource_Sharing/Tipasa/Borrowing_Requests/Process_requests#View_local_holdings_and_availability
https://help.oclc.org/Resource_Sharing/Tipasa/Configuration/Tipasa_Non-WMS_Circulation_Integration

If your library uses Innovative's Sierra, we encourage you to enable OPAC integration for automatic retrieval of local holdings and availability information. Please contact OCLC Support to request these be enabled.

https://help.oclc.org/Resource_Sharing/Tipasa/Borrowing_Requests/Process_requests#View_local_holdings_and_availability

Have you updated addresses within each of your borrower and lender Constant Data records in OCLC Service Configuration? If not, please do so on behalf of all your borrowing and lending partners. Address labels do not print properly unless the addresses are formatted correctly.

Follow-up actions

In an effort to keep your staff informed of new features and changes, you may also want to consider these items.
Share these release notes with your colleagues.

Gather your team for the upcoming webinar **Product Insights: Resource Sharing**.

Date: Wednesday, April 22, 2020, 2:00pm, Eastern Daylight Time (New York, UTC -04:00)  

Start 2020 off right by attending the Workshop Series: Learn how to fine-tune your ILL setup to save you time and speed turnaround for your library’s users. Topics include:

- Construct your Custom Holdings - [view recording](https://help.oclc.org/Resource_Sharing/Tipasa/Release_notes_and_known_issues/2020_release_notes/100Tipas...)  
- Automate your request process - coming in May (register [here](https://help.oclc.org/Resource_Sharing/Tipasa/Release_notes_and_known_issues/2020_release_notes/100Tipas...))  
- Curate and care for your Constant Data - coming in June  
- Make your usage statistics count - coming in July  

Have you signed up for [email alerts](https://help.oclc.org/Resource_Sharing/Tipasa/Release_notes_and_known_issues/2020_release_notes/100Tipas...) for News in the **Community Center**? This will ensure that Tipasa release notes and events come straight to your inbox.

An overview recording is available in the OCLC Community Center:

[https://www.oclc.org/community/ill_prime/events/analytics.en.html](https://www.oclc.org/community/ill_prime/events/analytics.en.html)
Include Request ID with problem reports

When reporting an issue with Tipasa, it's very helpful to include the Request ID. Including this information allows us to directly trace what happened on the request we are troubleshooting.

New features and enhancements

Use Automated Request Manager to set up and manage automations

In this release, we're excited to introduce the new Automated Request Manager, which replaces Direct Request profiles. The Automated Request Manager provides a new, user-friendly interface to make it easier for you to configure automations. Note that your existing Direct Request profiles will be automatically transferred into the Automated Request Manager. Although no immediate action is needed, we encourage you to use the friendlier interface to review your existing automations and add new ones. You can access the Automated Request Manager in OCLC Service Configuration.

See Automated Request Manager for more information.

At the top of the Automated Request Manager screen, you can now see clearly what standard
actions are done for all new borrowing requests, regardless of other automations.

### Adding and reviewing automations

To create a new automation, click **Add New** to open the form for specifying your criteria. These fields are required:

- **Name**: Use something descriptive of what the automation is intended to do
- **Priority**: Give the most specific automations the highest Priority (lowest score)
- **At least one of the following**: Match, Action, or Exception. The same match criteria cannot be used more than once in a given automation.

To help ensure your automations will do what you're expecting, new validation and error messages will display as needed when you save your automation, listing any errors that need to be addressed before the automation can be saved.

All of your automations will display in Priority order with descriptions that make it much easier to understand the actions of your automations.

### Matches

In the Matches section, the drop-down menu includes all match criteria that were available from Direct Request profiles. They are used in the same way as before.
Match based on Patron Note

In addition to the previously available match criteria, you can now also match requests based on the presence of a Patron Note or on specific content within a Patron Note (words, phrases, etc.). You can enter multiple search terms (words or phrases) separated by commas. There is an implied Boolean OR between search terms. For example: rush, fast, need it now would match a patron note that had either the words rush or fast or the exact phrase "need it now."

Actions

Actions let you tell the system specifically what to do with requests that match your match criteria. If you do not select any match criteria, the action will apply to all requests.

Exceptions
Exceptions allow you to specify certain scenarios where different actions should be taken. For instance, you can decide that if an item is held by your library the request should be routed to review instead of having the other actions applied.

**Main Automations**

Configure automations that will be applied to new borrowing requests. Only the best matching automation will be applied to a request.

<table>
<thead>
<tr>
<th>Name</th>
<th>Matches</th>
<th>Actions</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>LOAN</td>
<td><img src="image" alt="Add a Match" /></td>
<td><img src="image" alt="Add an Action" /></td>
<td><img src="image" alt="Priority" /></td>
</tr>
</tbody>
</table>

Providing feedback

A link is available at the top of the Automated Request Manager screen in OCLC Service Configuration for letting us know what you think about this new functionality. We'd appreciate hearing about your experiences, and please feel free to use this form multiple times to submit your feedback.

**Automated Request Manager**

*We want to hear your thoughts on the new Automated Request Manager.*

Documentation will be available at the time of the release.

**Deliver Get It Now articles via Article Exchange**

If your library uses Get It Now, you'll soon be able to deliver Get It Now articles via Article Exchange. This functionality will be in a separate release later in March 2020. Please watch for an announcement in the OCLC Community Center when this option becomes available.
Notes

Tipasa API completed

Technical work has been completed and installed with this release for the Tipasa API, which provides the groundwork for future improved interoperability between external systems and additional functionality in the user portal. Please watch future release notes for additional announcements on the Tipasa API.

FirstSearch administration module discontinued

As of Thursday, February 6, you can no longer use the FirstSearch administrative module to change ILL configurations. No action is required. All data and settings configured in FirstSearch are maintained and available for editing in OCLC Service Configuration.

The following FirstSearch administration pages no longer allow editing, but you can instead make changes in OCLC Service Configuration:

- Resource Sharing > Staff ILL Settings > Resource Sharing Options
- Resource Sharing > Staff ILL Settings > Constant Data Records
- Resource Sharing > Staff ILL Settings > Saved Notes
- Resource Sharing > Staff ILL Settings > Custom Holdings Groups
- Resource Sharing > Staff ILL Settings > Custom Holdings Paths
- Resource Sharing > Staff ILL Settings > Custom Holdings Symbols Search
• Resource Sharing > Staff ILL Settings > Direct Request Profiles

Note that the following pages remain, so you can still configure them in the FirstSearch administration module:

• Resource Sharing > Patron ILL Settings > Patron ILL Request Form
• Resource Sharing > Patron ILL Settings > ILL via E-mail

If you have questions or need help with logging in to OCLC Service Configuration, please contact OCLC Support.

**Support for Transport Layer Security (TLS) versions 1.0 and 1.1 discontinued**

To continue providing best-in-class security and to align with evolving industry standards, OCLC discontinued support for Transport Layer Security (TLS) versions 1.0 and 1.1 on February 3, 2020.

OCLC systems accessed through the internet use the TLS encryption protocol for data protection. Your internet browser used to access OCLC systems will need to be updated to TLS version 1.2 or higher. Current versions of most browsers such as Chrome, Internet Explorer, Edge, Firefox, and Safari already accept TLS 1.2 or higher. Therefore, you likely will not be impacted and can continue to access OCLC systems as you do today.

For a list of impacted products and information about testing your browser, see TLS security enhancements or contact OCLC Support.

**Bug fixes and known issues**

For a list of current and recently fixed issues, see Known issues.

**Future releases**

Roadmap information is available in the OCLC Community Center.

**Important links**

**Product Insights: Resource Sharing**

To help you become familiar with the enhancement and fixes included in this release, please attend the upcoming webinar Product Insights: Resource Sharing.

Date: Wednesday, April 22, 2020, 2:00pm, Eastern Daylight Time (New York, UTC-04:00)

Please note the session time zones when registering. The sessions will be recorded and archived for future viewing on the OCLC Community Center. Please register, even if you are unable to attend, to receive a link to the recorded session.
Workshop Series on Policies and Configurations

Start 2020 off right by attending the Workshop Series: Learn how to fine-tune your ILL setup to save you time and speed turnaround for your library’s users. Topics include:

- Fine-tune your Policies and Deflections - view recording
- Construct your Custom Holdings - view recording
- Automate your request process - coming in May (register here)
- Curate and care for your Constant Data - coming in June
- Make your usage statistics count - coming in July

Support website(s)

Support information for this product and related products can be found at:

- Tipasa product website
- OCLC Community Center
- OCLC Support: When calling OCLC Customer Support (U.S.), press option 7 to be directed to a Tipasa Tier 1 Support Specialist.
- Browser compatibility chart